



***Leading the Commissioning Process:  
Step-by-Step Strategies for New Construction Projects  
Daily Agenda***

**MONDAY**

**Course Introduction**

**Winning the Work—An Overview of the Business Side of Commissioning**

- Business aspects of commissioning
- Ways to attract clients
- Key selling points
- How to identify target markets

**You're Hired!**

- Introduces the "Class project" that will take participants through every stage of the commissioning process during the five-day course

**Determining the Owner's Needs—Developing the Owner's Project Requirements**

- What the OPR includes
- Why it's important
- Methods available for creating the OPR
- Experience an OPR workshop

**Creating the OPR Document**

- Summarizing workshop results
- Creating narratives, performance criteria, measurable goals
- "Red flags" when reviewing OPRs

**Forming the Commissioning Team**

- How and why to form a commissioning team
- Roles and responsibilities
- How to help an owner select an architect/engineer
- How to develop a communication plan

**Pulling It All Together—Formalizing Commissioning Using a Commissioning Plan**

- Purpose of a CxPlan
- How to develop the CxPlan
- Example CxPlan

**TUESDAY**

**Meet Your Architect and Engineer**

- Addition of the A/E to the "class project" team

### **What's a Basis of Design and Why Do We Need One?**

- Purpose and content of the BoD
- Example BoD discussion

### **Helping the Design Team Deliver High Quality**

- Tools to help the design team
- Checklists
- Design reviews

### **Workshop Design Review**

- Workshop design review of the "class project" plans

### **Preparing for the Construction Phase, Part I**

- Pre-construction phase activities
- Preparing for verification checks

### **Preparing for the Construction Phase, Part II**

- Functional test procedure development
- Planning for O&M requirements

Note: A one-hour orientation session for the UW commissioning exam is held at the end of class Tuesday.

## **WEDNESDAY**

### **Test Procedure Group Project**

- Participants develop a basic test procedure using information available at this stage in a project

### **How to Make Your Job Easier—Integrating Commissioning into the Process**

- Commissioning specifications and their role in the overall process
- How to develop and integrate Cx specifications
- Purpose and benefit of integrated specs

### **Requesting, Reviewing, and Using Submittals**

- Role of submittals
- Why submittal review is important
- How to request and review submittals
- How submittals play a role in upcoming commissioning activities

### **Tracking Checklist Completion**

- Value of tracking
- What information tracking provides
- How tracking checklists aid in scheduling construction phase activities

### **Team Meetings and Conflict Resolution**

- Techniques for effective team building
- Conflict avoidance and resolution
- Commissioning team meetings

### **Site Visit Procedures**

- Tools and skills necessary to plan and execute a commissioning site visit
- Importance of regular site visits
- Knowledge that is gained
- Effect on other members of the project team

## **THURSDAY**

### **Integrating Commissioning with TAB Activities**

- Providing value to the owner
- Understand the distinction between TAB and the commissioning process

### **Performing Test Procedures**

- Testing techniques for a variety of system types

### **Testing Real Systems—Hands-On Exercises; Test Intro**

- Group activity session
- Hands-on testing experience at the course location

### **Reporting Techniques**

- Why and how to maintain regular, organized reports
- Ways to resolve issues

## **FRIDAY**

### **Assuring Quality O&M Documentation and Training**

- Importance of quality documentation and training
- Features that identify documentation or training as high-quality

### **Occupancy and First Year of Operation**

- Commissioning authority's role
- What types of issues or problems to expect
- How to maintain involvement with the owner and project
- Developing and executing seasonal tests
- Preparing and executing the warranty review

### **Continuous Commissioning, Recommissioning, and Retro-Commissioning**

- Differences between these concepts
- Implications of each

### **Spreading the Word—Final Report and Case Studies**

- Value and importance of the final report and case studies
- Elements that go into the final report
- Audience report
- Value of the report to the life of the building and project

### **Planning a "Lessons Learned" Meeting**

- Meaning and purpose
- Benefits available to all team members